to have fewer connections due to the fact that Miami is a hub for American Airlines and provides non-stop service to a large number of destinations.

Figure 2.6 provides a comparison of market share, by airline for 1995 and 2000. American Eagle's market share has remained essentially constant, while Cape Air and Gulfstream have gained market share during this period. Conversely, Comair and US Airways have lost market share. These general trends reflect the relative strength of the markets they serve. As noted, American Airlines' strong hub operation at Miami gives American Eagle a dominant position in the Key West market. US Airways operations connect to Tampa and Miami. While the Tampa and Miami operations for US Airways are not hubs, they do offer non-stop service to a number of northern destinations. Furthermore, the Tampa Bay and Miami markets have significant population bases. These factors provide an explanation why US Airways has the second-largest market share at Key West.

Gulfstream Airlines provides service to Miami, Ft. Lauderdale, and Tampa. Gulfstream has gained market share as a result of the aforementioned factors and the code-share agreement with Continental Airlines

2.5 HISTORICAL AIRCRAFT OPERATIONS

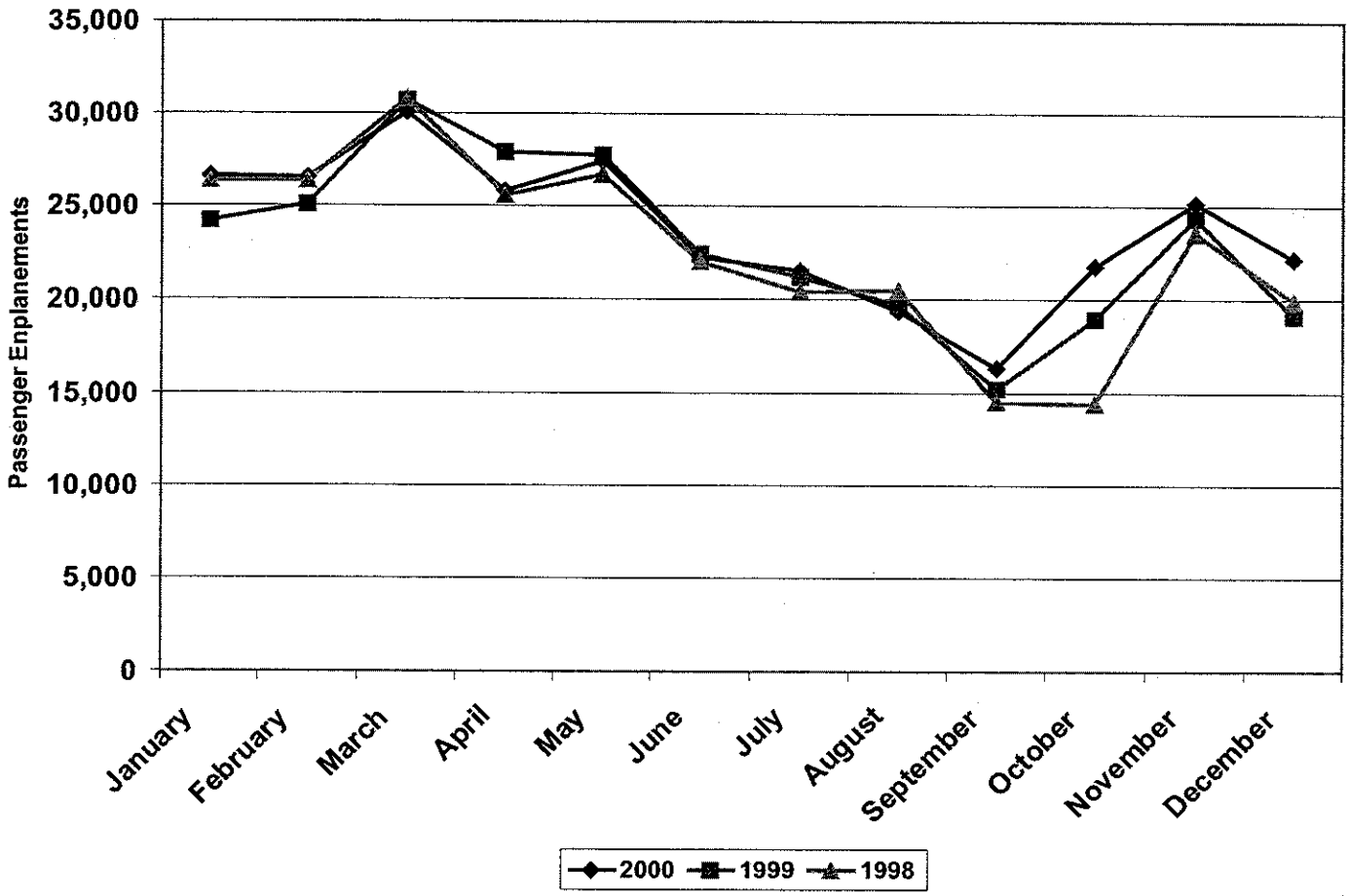
Data regarding historical aircraft operations have been compiled to provide an understanding of past trends that could prove useful for estimating future growth. Historical aircraft operations were obtained from airport management records, EYW ATC records and personnel, and historical FAA Terminal Area Forecasts (TAF). Historical operational data are presented and discussed in the following paragraphs.

2.5.1 ANNUAL AIRCRAFT OPERATIONS

Historical total annual aircraft operations from 1976 through 2002 are presented in Table 2.3 and Figure 2.7. Total aircraft operations increased from approximately 68,000 in 1976 to approximately 95,000 in 2001. It should be noted that differences in the methodology used to count aircraft operations account for some of the recent fluctuation of totals. For example, in 1996 through 1999 military aircraft operations that transitioned through EWY airspace were counted as operations. This practice was stopped in the year 2000. Historical aircraft operations, by category, for the years 1991 through 2002 are presented in Table 2.4.

2.5.1.1 Air Carrier Operations

For traffic count purposes, an air carrier aircraft is defined as an aircraft capable of carrying more than 60 passengers. Historically, most aircraft operating at EYW were commuter aircraft in the 19- to 35-seat category. However, in 1999, American Eagle began operating the ATR-72 aircraft to the Key West market. The ATR-72 can accommodate up to 68 passengers and is, therefore, considered an air carrier aircraft. This has led to the recent increase of air carrier operations as presented in Table 2.4.



Key West International Airport
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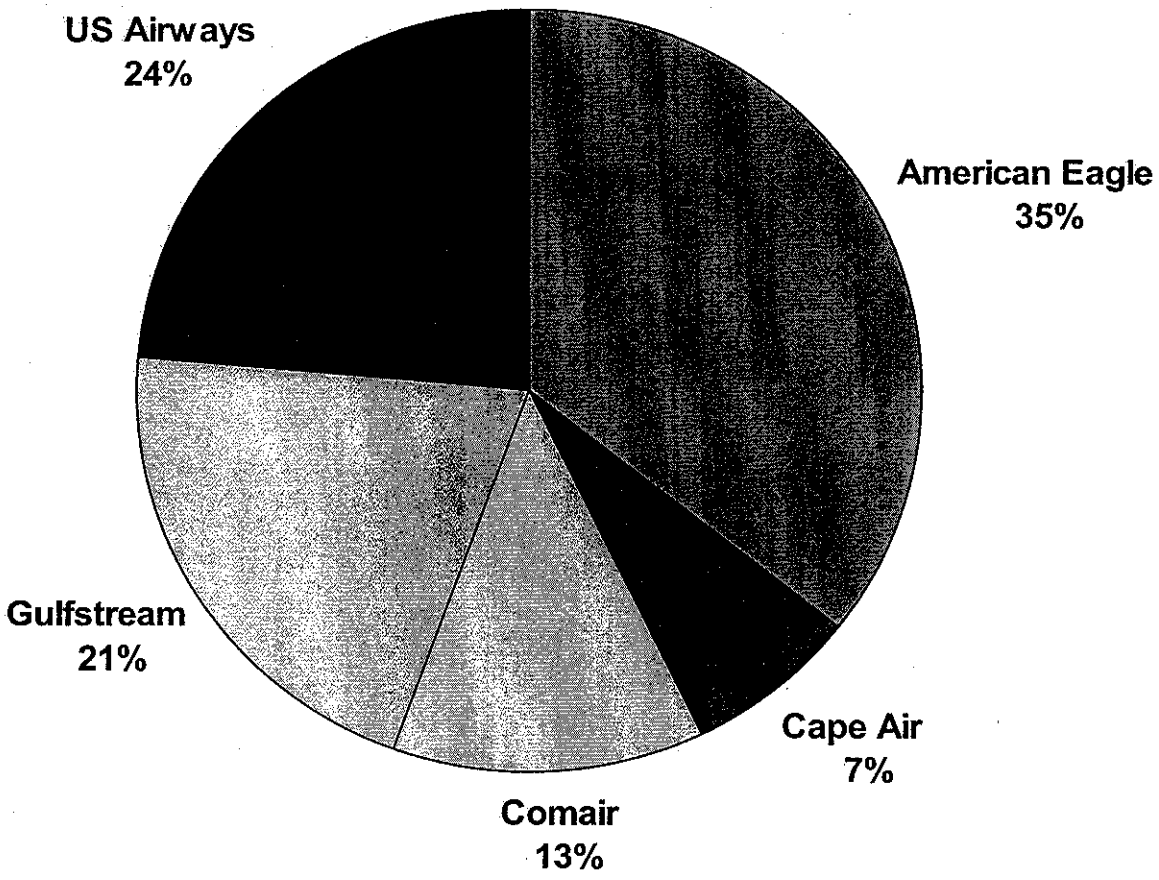
MONTHLY PASSENGER DISTRIBUTION

FIGURE: 2.4

GRAPHICS\KEYWESTMPUPDATE2001_FIG-2-4.AI



Key West International Airport
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2000 AIRLINE MARKET SHARE

FIGURE: 2.5

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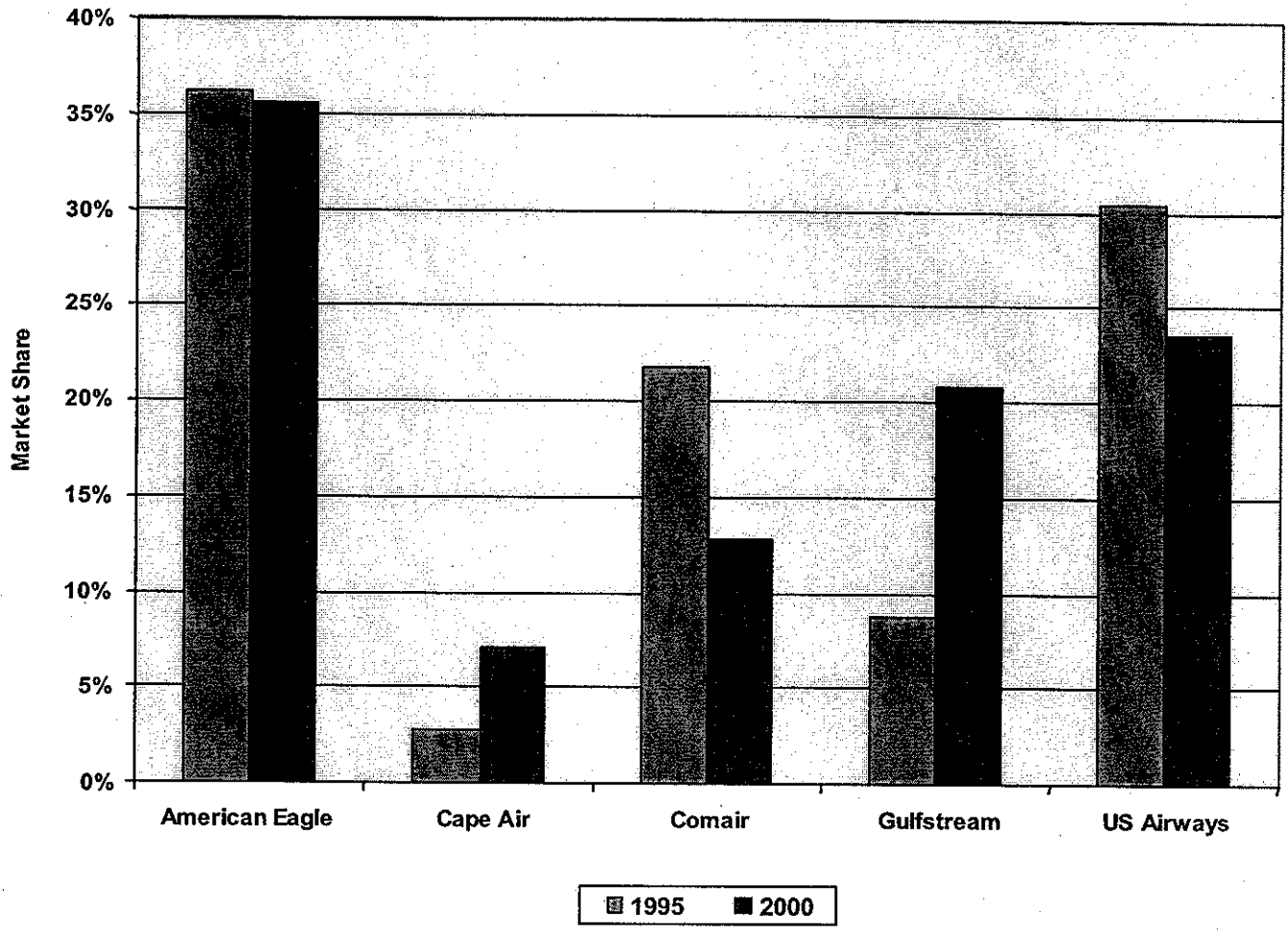

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HISTORICAL AIRLINE MARKET SHARE

FIGURE: 2.6

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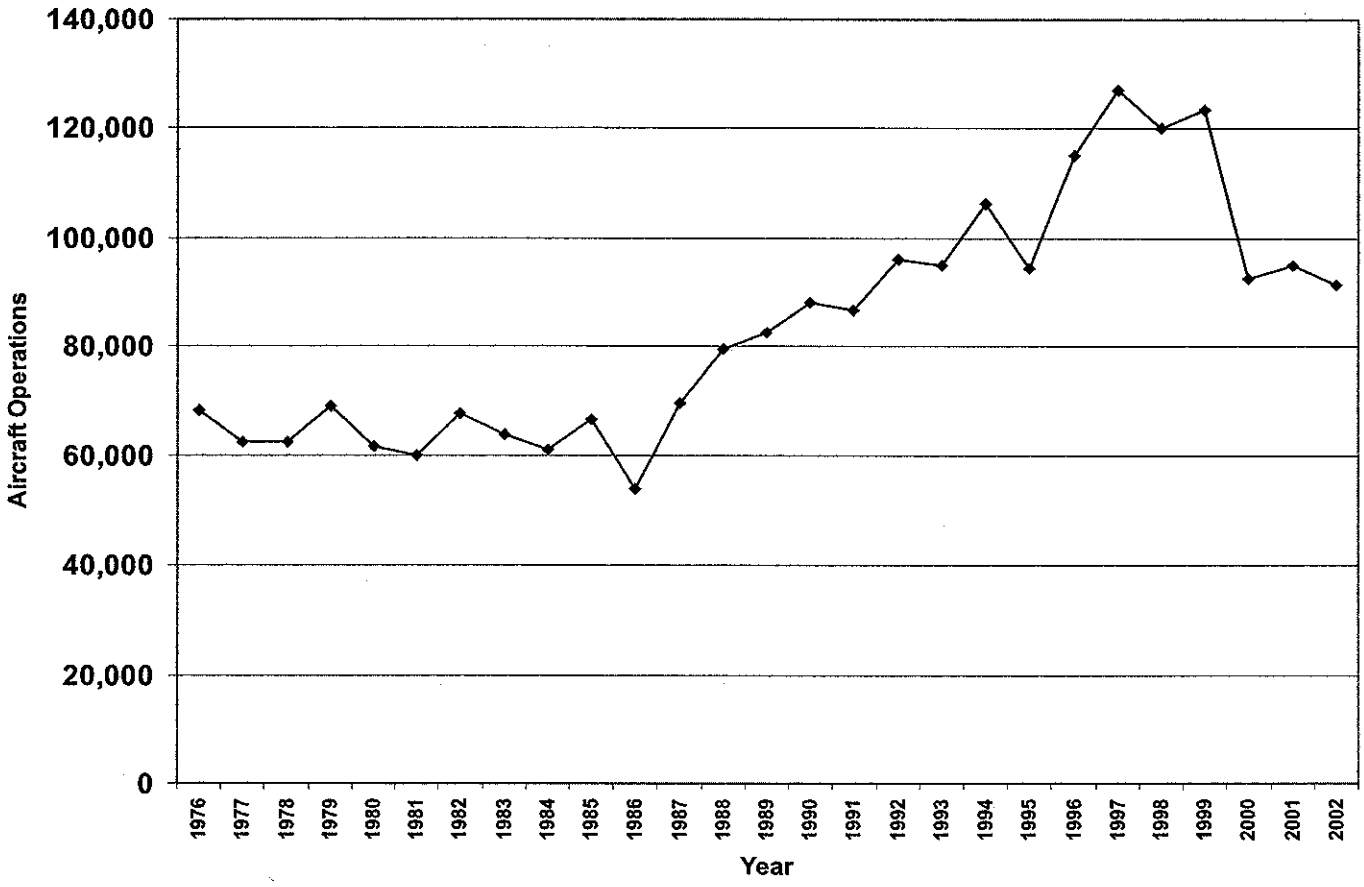

Key West International Airport
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HISTORICAL AIRCRAFT OPERATIONS (1976 to 2002)

FIGURE: 2.7

GRAPHICS\KEYWEST\MPUPDATE2001_FIG-2-7.AI

TABLE 2.3
HISTORICAL TOTAL AIRCRAFT OPERATIONS
Key West International Airport
Master Plan Update

Year	Total Aircraft Operations	Percent Increase or Decrease
1976	68,182	-
1977	62,391	-8.5%
1978	62,494	0.2%
1979	69,168	10.7%
1980	61,446	-11.2%
1981	60,041	-2.3%
1982	67,606	12.6%
1983	63,693	-5.8%
1984	61,006	-4.2%
1985	66,506	9.0%
1986	53,735	-19.2%
1987	69,521	29.4%
1988	79,439	14.3%
1989	82,583	4.0%
1990	88,147	6.7%
1991	86,748	-1.6%
1992	96,018	10.7%
1993	94,902	-1.2%
1994	106,288	12.0%
1995	94,363	-11.2%
1996	115,058	21.9%
1997	126,916	10.3%
1998	120,178	-5.3%
1999	123,295	2.6%
2000	92,591	-24.9%
2001	95,038	2.6%
2002	91,524	-3.7%

Sources: Key West Air Traffic Control Tower.
Airport Management Records.
FAA Terminal Area Forecasts.

2.5.1.2 Commuter Operations

In recent years, operations by commuter aircraft have accounted for approximately one-third of all aircraft operations at EYW. Historical commuter operations are presented in Table 2.4. Common types of commuter aircraft include the ATR-42, Beech 1900, DeHavilland DASH-8, and the Embraer Brasilia. Due to the introduction of the ATR-72, which is classified as an air carrier aircraft rather than a commuter aircraft, as well as other reasons, commuter operations have decreased in recent years.

TABLE 2.4
HISTORICAL AIRCRAFT OPERATIONS BY CATEGORY (1991 – 2001)
Key West International Airport
Master Plan Update

	Itinerant Operations					Local Operations			Total
Year	Air Carrier	Air Taxi & Commuter	GA	Military	Total	GA	Military	Total	Operations
1991	705	26,107	34,764	808	62,381	23,874	327	24,201	86,748
1992	6	28,418	40,704	709	69,807	25,264	552	26,176	96,018
1993	1	29,669	43,418	452	73,540	21,028	334	21,362	94,902
1994	2	37,165	41,701	3,199	82,067	23,575	646	24,221	106,288
1995	0	33,423	39,154	4,056	76,633	16,976	764	17,730	94,363
1996	0	38,415	39,511	10,827	88,753	23,353	2,952	26,305	115,058
1997	4	38,604	45,731	10,996	95,335	25,812	5,769	31,581	126,916
1998	22	40,928	43,288	11,244	95,482	21,604	3,920	24,696	120,178
1999	1,047	38,473	43,867	14,649	98,036	20,656	4,603	25,259	123,295
2000	1,899	33,361	39,814	1,767	76,841	12,596	3,154	15,750	92,591
2001	1,693	34,548	35,692	887	72,820	10,948	11,270	22,218	95,038
2002	3,638	32,710	34,302	956	71,371	10,441	9,712	20,153	91,524

Sources: Historical data for 1991 through 1996 is from the Key West International ALP Report, Table 3.4 prepared by URS.
Data for 1997 through 2000 were obtained from the EYW air traffic control tower, except for 1998, which was obtained from the FAA TAF.
Compiled by URS, May 2002.

2.5.1.3 General Aviation Operations

General aviation includes all segments of the aviation industry except commercial air service (i.e., air carriers and commuters) and military. Typical general aviation activities include pilot training, corporate flying and pleasure flying. General Aviation (GA) aircraft operations are generated by single-engine and multi-engine (piston) aircraft, turboprop and turbojet aircraft, and helicopters.

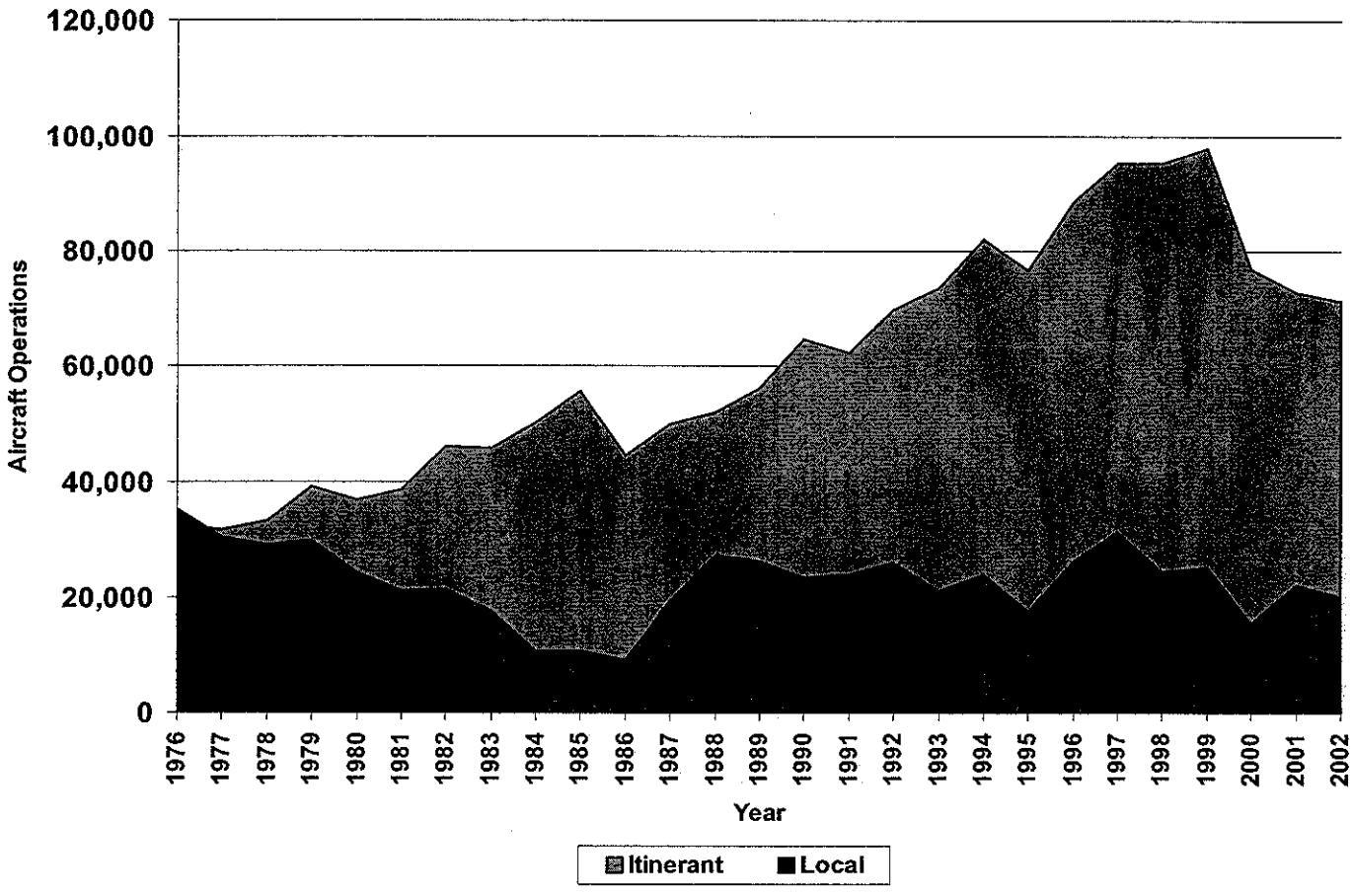
General aviation operations are typically recorded as being local or itinerant. Local operations primarily consist of touch-and-go operations, whereby an aircraft remains in the airport traffic pattern for practicing landings and takeoffs. Itinerant operations consist of flights that arrive from or depart to other airports.

Historical GA operations are shown in Table 2.4. Itinerant GA operations have historically been in the 40,000 range during the last decade. Local GA operations have experienced greater variation from year to year, but have generally been in the 20,000 to 25,000 range annually. The sharp decline to 15,000 operation in 2000 was possibly due to changes in how ATC personnel counted operations. An illustration of the breakdown between itinerant and local general aviation aircraft operations from 1976 through 2002 is provided in Figure 2.8.

2.5.1.4 Military Operations

Use of EYW for military flights is not frequent because of the availability of Naval Air Facility (NAF) Key West. Primary military use at EYW is by U.S. Coast Guard and Army Helicopters.

Military aircraft operations shown in Table 2.4 are not indicative of demand for EYW facilities. This is because the majority of the military aircraft operations did not takeoff or land at EYW,



Key West International Airport
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HISTORICAL ITINERANT AND LOCAL GA AIRCRAFT OPERATIONS

FIGURE: 2.8

GRAPHICS\KEYWEST\MPUPDATE2001_FIG-2.8.AI

but merely transited through EYW's airspace en route to NAF Key West. An overflight is not an operation at the airport and therefore, distorts the statistics.

2.5.2 MONTHLY AIRCRAFT OPERATIONS

Aircraft operations have historically peaked at EYW during the month of March when tourist season is at its peak. This trend can be seen in the data for 1999 through 2001 which is presented in Table 2.5.

TABLE 2.5
MONTHLY DISTRIBUTION OF AIRCRAFT OPERATIONS
Key West International Airport
Master Plan Update

Month	1999		2000		2001	
	Operations	Percent	Operations	Percent	Operations	Percent
January	11328	9.2%	8555	9.2%	9388	9.9%
February	11873	9.6%	8756	9.5%	9173	9.7%
March	13933	11.3%	9133	9.9%	10020	10.5%
April	14784	12.0%	8147	8.8%	9168	9.6%
May	11610	9.4%	7950	8.6%	9016	9.5%
June	11029	8.9%	7248	7.8%	8101	8.5%
July	9424	7.6%	7107	7.7%	7277	7.7%
August	9075	7.4%	5971	6.4%	7113	7.5%
September	7423	6.0%	6311	6.8%	5063	5.3%
October	7034	5.7%	7732	8.4%	6881	7.2%
November	8134	6.6%	7975	8.6%	6185	6.5%
December	7648	6.2%	7706	8.3%	7653	8.1%

Source: Key West International Airport, Air Traffic Control Tower.

2.5.3 BASED AIRCRAFT

The historical and current mix of aircraft based at EYW is shown in Table 2.6. Data from 1980 indicates that the total number of based aircraft has been approximately 50 for an extended period of time. A detailed inventory of based aircraft including registration numbers (tail or N-numbers), ownership data, make and model, number and type of engines, number of seats, and range of weights was taken in March 1996 by the fixed base operator (FBO) and updated for this master plan in July 2001.

There were 56 aircraft based at EYW in July 2001. The based aircraft fleet mix was 59 percent single engine piston powered (33), 29 percent light multi-engine piston powered (16), 9 percent turboprop powered (5), 2 percent turbojet aircraft (1), and 2 percent helicopters (1). The turbojet aircraft included one Citation Jet.

TABLE 2.6
BASED AIRCRAFT MIX
Key West International Airport
Master Plan Update

Year	Single Engine	Multi-Engine	Turboprop	Jet	Helicopter	Total
1980	36	14	0	0	0	50
1994	35	10	0	2	0	47
1996	32	12	2	4	0	50
2001	33	16	5	1	1	56

Source: 1996 and 2001 Data - Survey by Island City Flying Service, Inc.

2.6 AVIATION FORECASTS

This section presents forecasts of passenger enplanements, aircraft operations, and based aircraft. Forecasts from other studies and sources are presented first to provide a reference from which to compare the forecasts developed for this study. The forecasts presented in this report account for the effects that the terrorist attacks of September 11, 2001, had on air travel demand at EYW.

2.6.1 PASSENGER ENPLANEMENTS

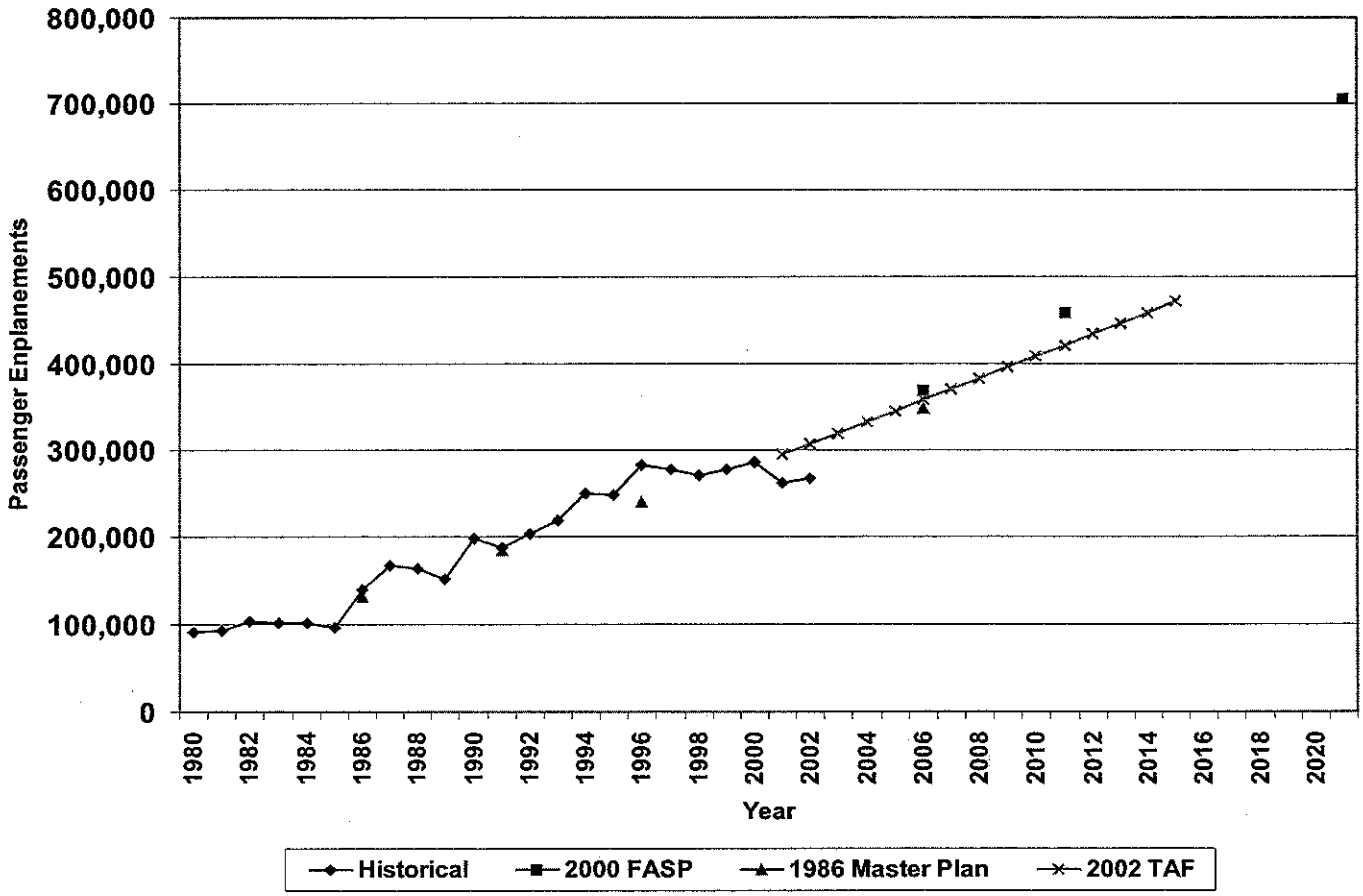
A forecast of passenger enplanements is needed to size a variety of facilities at the airport including the passenger terminal and the public portion of parking facilities. The following paragraphs provide an overview of forecasts previously prepared for EYW and is followed by forecasts developed for this study.

2.6.1.1 Previous Forecasts

Forecasts of passenger enplanements at EYW were obtained from three independent sources. These sources include the Florida Aviation System Plan prepared by the Florida Department of Transportation, the FAA's Terminal Area Forecast, and the 1986 Key West International Airport Master Plan. These forecasts and historical passenger enplanements at EYW from 1980 through 2002 are presented in Figure 2.9.

Florida Aviation System Plan (FASP)

The FASP provides forecasts of passenger enplanements and aircraft operations at each of the commercial service airports in Florida. The methodology used to prepare the forecast consists of obtaining average annual growth rates from specific planning documents and then applying that growth rate to the number of passenger enplanements that occurred in the year 2000. The forecast then projects the number of passenger enplanements that would occur through the year 2021. In the case of EYW, the specific planning document used was the FAA's 2000 Terminal Area Forecast, which predicted a growth rate of 4.4 percent. Applying this growth rate to the 285,000 passenger enplanements that occurred in 2000 results in a forecast of 704,000 passenger enplanements at EYW in the year 2021.



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Key West International Airport
Master Plan Update

PREVIOUS FORECASTS OF PASSENGER ENPLANEMENTS

FIGURE: 2.9

FAA Terminal Area Forecast

The FAA publishes a forecast for all commercial service airports in the United States that is used to guide federal decisions regarding airport facilities. The most recent TAF available is the one released in 2002; this forecast did not take into account the terrorist attacks of September 11, 2001. Consequently, the 2002 TAF is likely to significantly overstate future growth. The average annual growth rate forecasted by the TAF is 3.5 percent. The forecast predicts 472,000 passenger enplanements at EYW in the year 2015 as depicted in Figure 2.9.

1986 Key West International Airport Master Plan

The previous master plan provided a forecast of passenger enplanements from 1986 through 2006. According to the master plan, a time series regression of historical passenger enplanements was conducted to derive the forecast. The forecast predicted an average annual growth rate of 5 percent. This resulted in a forecast of 347,000 passengers in the year 2006 as depicted in Figure 2.9.

2.6.1.2 Updated Forecasts

This section presents new forecasts of passenger enplanements at EYW that consider a variety of factors. Forecasts of these items from other sources and for larger regions such as the State of Florida and the United States are also presented for comparison purposes.

Forecasts of passengers are usually prepared on the basis of the population residing within the airport's service area, their disposable income, and some variable that is representative of the average airfare. This is because the demand for air travel is predominantly a factor of the number of people desiring air service, their ability to pay for air service, and the cost of air service to the customer. While this is an acceptable methodology in instances where the majority of the people using the airport are local residents, it is significantly less valuable for airports where the majority of the passengers are visitors. At EYW the majority of the passengers are tourists visiting Key West for pleasure. Consequently, reliance on socioeconomic data of the airport's local service area is of little value for forecasting.

Therefore, forecasts for EYW were based upon a series of assumptions. These assumptions were used to create scenarios. The development of scenarios is useful when planning for situations that have a high level of uncertainty and hence the likelihood for a wide disparity in the likely level of growth.

Three scenarios were created for the forecast of passenger enplanements at EYW. These scenarios included low-growth, moderate-growth, and high-growth scenarios. The assumptions contained in each of these scenarios are listed below:

Issue	Growth Scenario Assumptions		
	Low-Growth	**Moderate-Growth**	**High-Growth**
Use of Regional Jets	No Use	Limited-Use	Successful-Use
Air Service	Potential Loss	Remains Constant	Remains Constant
Air Fares	High Fares Prevail	Moderate Fares	Moderate Fares
Other Factors:	Alternate Modes of Transportation Gain		Further Congestion on US Highway 1
			Potential Operations to Cuba
Average Annual Growth Rate	1%	2.5%	3.5%

Another issue to consider is the impact of the terrorist attacks of September 11, 2001, and the effect on passenger enplanements that is likely to occur during the next 2 years. To assess this impact, a comparison of monthly passenger trends since September 11, 2001, was made. This comparison is depicted in Table 2.7. As the table indicates, monthly passenger levels were reduced by approximately 30 percent in the months immediately after the attacks. However, this decrease lessened to 17 percent by January of 2002. By the key tourist season months of February through April, passenger enplanements were just 5 to 6 percent lower than levels the preceding year.

TABLE 2.7
COMPARISON OF MONTHLY PASSENGER ENPLANEMENTS
(2001 AND 2002)
Key West International Airport
Master Plan Update

Year	Month	Passenger Enplanements	% Change from Previous Year
2001	September	11,512	-30%
	October	16,826	-23%
	November	17,414	-31%
	December	17,572	-21%
2002	January	22,881	-17%
	February	24,368	-6%
	March	28,763	-5%
	April	26,363	-6%

Source: Key West International Airport Management Records.

For the year 2001 as a whole, passenger enplanements at EYW were 8 percent lower than 2000. For the year 2002 it is estimated that passenger enplanements will be 15 percent lower than the level experienced during 2000. This further decrease would be because during 2001 only 4 months of passenger levels that year were impacted by the terrorist attacks; however, during 2002, it is possible that all months will experience lower levels of passengers.

By the year 2003, it is assumed that passenger levels will experience a strong rebound and will return to the level attained in 2000. This is expected as time from the attacks increases and passengers return to flying and the general state of the economy in the United States improves from the recessionary conditions experienced during the latter part of 2001.

Figure 2.10 provides an illustration of passenger enplanement forecasts that would result assuming a rebound of passengers in 2003 as described in the preceding paragraphs; and the low, moderate; and high growth rates beginning in 2004 and continuing until the end of the forecast period. As the figure indicates, there is a fairly wide disparity between the resulting number of passenger enplanements that would result in the year 2021. With the low growth forecast, approximately 341,000 passengers are projected. This would increase to 445,000 with the moderate growth forecast and 523,000 with the high growth forecast. A breakdown of the resulting level of passenger enplanements for 5-year increments with each of the three growth rates is presented in Table 2.8.

TABLE 2.8
COMPARISON OF UPDATED PASSENGER ENPLANEMENTS
Key West International Airport
Master Plan Update

Year	Scenario		
	Low Growth Forecast	Moderate Growth Forecast	High Growth Forecast
2001	262,761	262,761	262,761
2006	294,019	307,314	332,454
2011	309,017	347,698	395,873
2016	324,780	393,388	459,293
2021	341,347	445,083	522,712

Source: URS, 2002.

2.6.1.3 Recommended Forecast

As previously depicted in Figure 2.3, historical trends show a distinct slowing of the annual average growth rate for passenger enplanements at EYW over the last three decades. The average annual growth during the last three decades has decreased from 15 percent during 1970 to 1980, to 8 percent during 1980 to 1990, to 3.7 percent during 1990 to 2000. Thus, on the basis on long-range trends, it is likely that the average annual rate of growth at EYW will continue to slow.

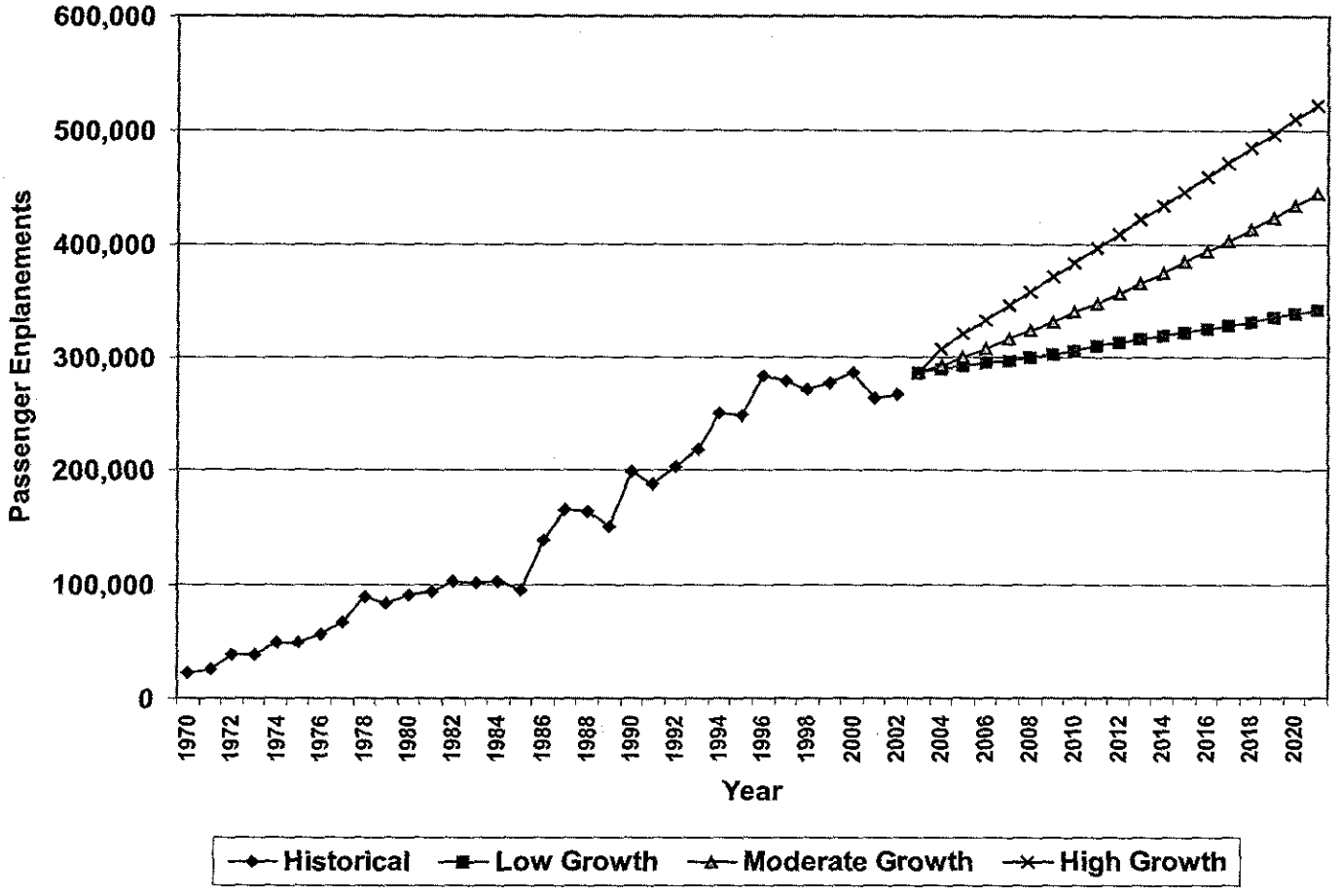
Another factor to consider is the growth rate projected nationally, the FAA's Aerospace Forecasts for fiscal years 2002 to 2013 projects that air carrier passenger enplanements will decline in 2002 by over 13 percent from 2001 and then rebound strongly during 2003. For the 2003 fiscal year passenger enplanement growth is projected to reach nearly 15 percent. The FAA projects that domestic air carrier enplanements will increase 3.8 percent a year for the remainder of the forecast period. For regional/commuter aircraft, the FAA projects that enplanements will grow in 3.7 percent in 2002 and 8.7 percent in 2003 and then grow at a stabilized rate of 5.5 for the remainder of the forecast period. The dramatic difference between the forecasted increase of passenger enplanements in the regional/commuter segment and the forecasted decrease in the air carrier segment reflects the difference of the Comair strike on the 2001 numbers. Overall, it is envisioned that passenger enplanements in the Key West market will more closely follow the FAA projections for the air carrier segment of the market than the regional/commuter segment even though all the operations at EYW are in the commuter segment. Support of this premise is provided by historical activity at EYW that has closely

followed the national growth rate for enplanements between 1990 and 2000, as previously noted in Section 2.4.1.

In addition to these major factors, there are several qualitative factors that should be considered when selecting a forecast for planning future facilities. Therefore, the following qualitative factors were considered to develop a recommended forecast:

1. Population in Monroe County is not projected to grow at the same rate as population within the State of Florida. The Bureau of Economic and Business Research at the University of Florida projects that population in Monroe County is likely to grow by just 5 percent during the period ending in 2030. By comparison, population within the State of Florida is projected to grow by 52 percent during the same period. These growth rates appear to favor a slow growth rate of air passenger at EYW because resident passenger will grow very little and while the growth for Florida residents is very significant, this segment of visitor (i.e., those within a reasonable driving distance of Key West) are the least likely to fly to EYW.
2. The airport's service area will remain the same size. No new airports are planned near the airport service area, nor is there a high feasibility that one could be established. The possibility of establishing joint use of NAF Key West has been studied as recently as 1995 and found to be not feasible for scheduled commercial service. Indications from the Unites States Navy are that NAF will not be a candidate for joint use for the foreseeable future.
3. The airport's landside facilities such as access roadways, terminal space and automobile parking space are constrained. While some further expansion of all of these facilities is possible, land and environmental constraints limit the ultimate magnitude of potential expansions.
4. The current system of hub and spoke operations, whereby commuter operations at EYW connect to air carrier operations at hub airports, such as Miami, will continue for the foreseeable future. This factor limits the number of new destinations that are likely to have direct air service established to EYW.
5. Certain commuter airlines, especially those providing connecting service to air carriers, will transition to regional jets. This will be due to the fleet strategies of certain airlines that plan to have an all jet fleet, as well as a passenger preference for the comfort and amenities offered by regional jet aircraft.
6. As previously noted in Section 2.3.5, the potential reestablishment of diplomatic relations with Cuba could create demand for air service from Key West. Previous attempts to estimate the timing and level of this demand have been a failure. Therefore, this master plan will not attempt to make a similar estimate. However, it appears reasonable to draw certain conclusions regarding the type of air service that may likely occur and the implications for the overall forecast of future passenger levels.

The structure of air service in the United States at the time service from Key West to Cuba was discontinued bears little resemblance to the structure of air service today. Point to point air service is now less common than service through hub airports. Thus, is likely that any future air service from Cuba will focus on hubs and cities in the United States that have high concentrations of Cuban-American populations. Furthermore, any future air service between



Key West International Airport
Master Plan Update

UPDATED FORECASTS OF PASSENGER ENPLANEMENTS

FIGURE: 2.10

GRAPHICS\KEYWEST\MPUPDATE2003_FIG-2-10.AI

Key West and Cuba would likely be tourist driven and would be limited in magnitude. Consequently, if such air service is reestablished at some point in the future, it is not anticipated that it would account for a high percentage of passenger enplanements at EYW.

Considering the above factors it is anticipated that the rate of passenger enplanement growth at EYW will continue to slow in agreement with the trend of the last 30 years. Consequently, it is recommended that the moderate-growth forecast, which projects an average annual growth rate of 2.5 percent, be selected as the basis for planning future facilities at EYW with the low- and high-growth forecasts used as the limits of possible future activity levels.

2.6.2 AIRLINE OPERATIONS

The number of aircraft operations by scheduled airlines at EYW is a function of the forecasted number of passengers, the average number of seats per aircraft operation, and the average load factor (i.e., number of seats filled with passengers). An analysis of load factors at EYW during 2000 revealed that load factors were averaging 62 percent. This analysis was conducted by dividing the number of enplaned passengers during 2000 by the number of scheduled seats for the same period. While this methodology contains a small amount of error, because it does not account for cancelled flights, it provides the best measure of load factors that is readily available.

The average number of seats per departure was calculated for 2001 by multiplying the actual number of departures (by aircraft type) by the number of seats per aircraft to obtain the total number of departing seats and then dividing that figure by the number of aircraft departures. For 2001 this figure was calculated to be 24 seats per aircraft departure.

Using this load factor and seats per departure as a starting point, a forecast of airline departures was prepared. The resulting forecast is presented in Table 2.9. This forecast assumes that the average load factor for all airlines at the airport will increase slightly to 63 percent as a result of increasing sophistication of yield management. The forecast also assumes that the number of seats per departure will increase from 24 to 36 as larger aircraft such as regional jets are introduced to the Key West market.

TABLE 2.9
FORECAST OF AIRLINE OPERATIONS
Key West International Airport
Master Plan Update

Year	Forecast Passenger Enplanements	Average Seats Per Departure	Estimated Load Factor	Average Passengers Per Departure	Estimated Airline Departures	Estimated Airline Operations
2006	307,314	28	0.62	17.36	17,702	35,405
2011	347,698	31	0.63	19.53	17,803	35,607
2016	393,388	33	0.63	20.79	18,922	37,844
2021	445,083	36	0.63	22.68	19,624	39,249

Source: URS, 2002.

2.6.3 GENERAL AVIATION

General aviation is a term used to describe all segments of the civilian aviation industry, except for airline operations. It includes a diverse range of aviation activities including business, agricultural, training and pleasure flying. To determine the requirements for various general aviation facilities, a forecast of general aviation demand has been prepared.

2.6.3.1 Based Aircraft

Historical levels of general aviation aircraft based at EYW were indicated in Table 2.6, previously shown. The table indicated that general aviation aircraft at EYW have remained fairly stable during the last two decades although some growth was recorded in the latest survey that counted 56 aircraft at the airport.

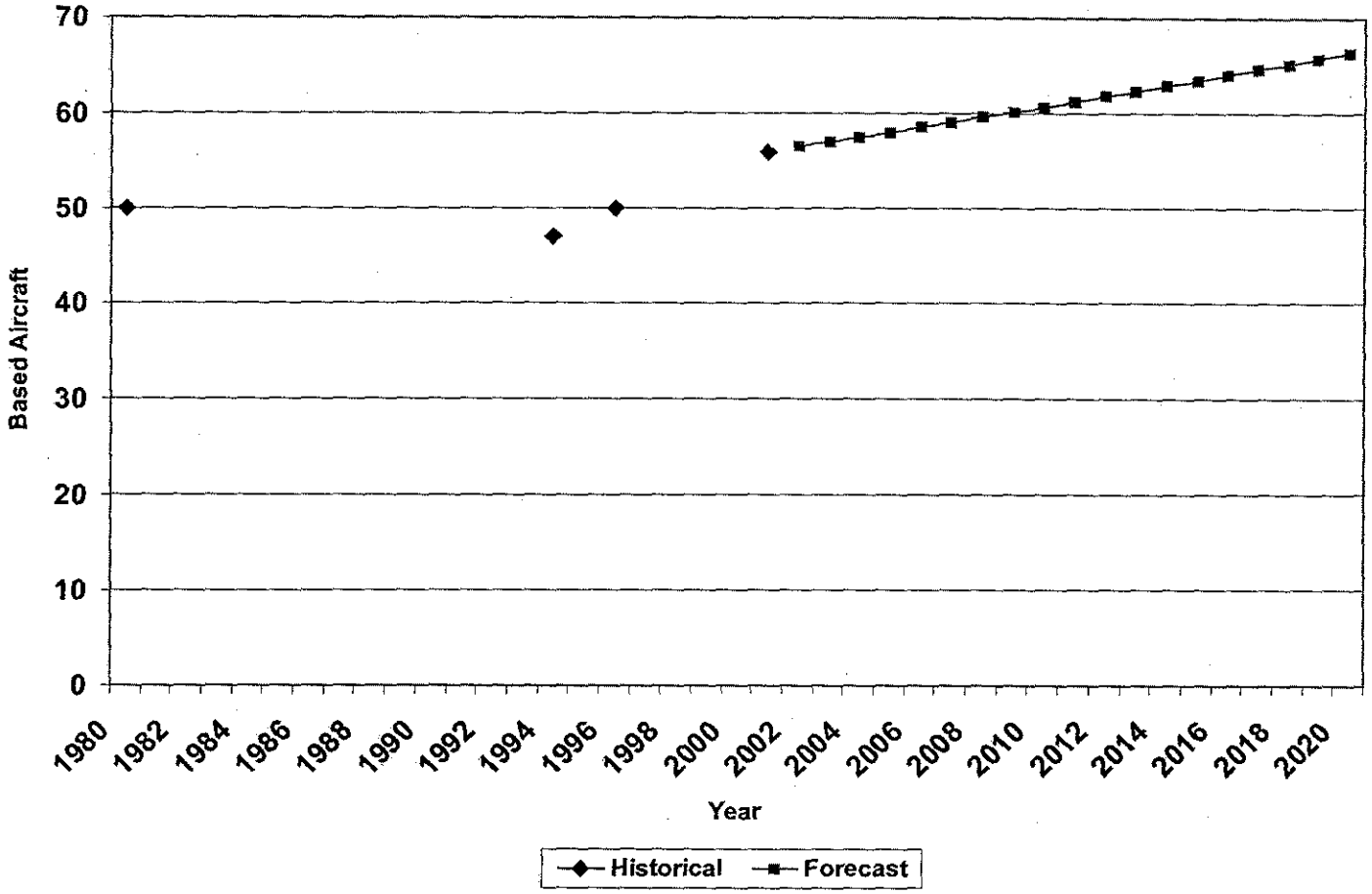
The FAA's Aerospace Forecast makes projections on the number of active aircraft across the United States. The projection contained in the 2002 forecast estimates that the active fleet of general aviation aircraft will increase at 0.3 percent annually through 2013. However, it should be noted that the growth rate is a composite for the fleet as a whole. Certain types of aircraft and certain areas of the country will experience different rates of growth or even decline as a preponderance of older aircraft are retired from service.

The FAA's forecast notes that there are a variety of factors affecting the state general aviation activity. In recent years, the most significant factor was the passage of the General Aviation Revitalization Act of 1994. That piece of legislation limited the liability on general aviation aircraft to 18 years. The legislation has been judged to be a success since the production of general aviation aircraft have increased in recent years. On the negative side, the general aviation industry continues to struggle with cost of ownership and cost of operation issues. Consequently, any future growth of aircraft is expected to be very small.

In light of the recent gradual increase of based aircraft and favorable factors with regard to a forecast of based aircraft has generated by applying an average annual growth rate of 0.9 percent to the current 56 aircraft based at the airport. This forecast is depicted in Figure 2.11. This forecast is very similar to the forecast of based aircraft contained in the FAA's 2002 Terminal Area Forecast which projects 64 based aircraft at EYW in the year 2015.

2.6.3.2 Based Aircraft Fleet Mix

The fleet mix for based aircraft and general aviation operations is expected to remain fairly constant in future years, because very little growth is expected in the general aviation segment. The mix for aircraft based at EYW in 2001 is depicted in Figure 2.12. As the figure indicates, nearly 60 percent of based aircraft are single-engine and nearly 30 percent are multi-engine. The remaining 10 percent are turbo-prop, jets or helicopters. This preponderance of lower performance aircraft is expected to continue at the airport in the future. By applying the 2001 fleet mix to the forecast of based aircraft a breakdown of future aircraft was obtained. This forecast is presented in Table 2.10.



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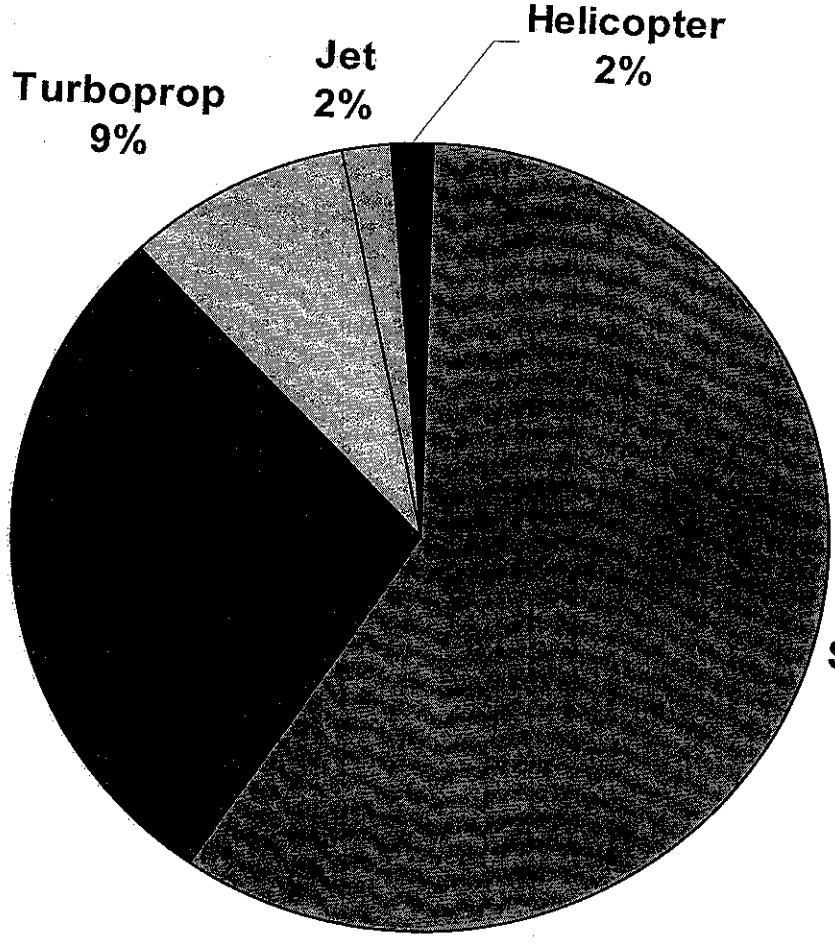
FORECAST OF BASED AIRCRAFT

FIGURE: 2.11

GRAPHICS\KEYWEST\MPUPDATE2001_FIG-2-11.AI



Key West International Airport Master Plan Update	2001 BASED AIRCRAFT FLEET MIX	FIGURE: 2.12

GRAPHICS\KEYWEST\MPUPDATE2001_FIG-2-11.AI